



COMDTINST 5213.8

18 AUG 1989

COMMANDANT INSTRUCTION 5213.8

Subj: Forms Automation

1. PURPOSE. To provide information on the maintenance of automated forms libraries and provide procedures for approval of forms created on the Coast Guard Standard Workstation (CGSW).
2. DIRECTIVE AFFECTED. HQINST 5213.7 is canceled.
3. BACKGROUND.
 - a. Forms are an important information gathering resource that formalize the person-to-person and organization-to-organization interactions required to perform Coast Guard (CG) missions. Automation will eliminate running out of forms, using the wrong forms, handling information more than once, and forms obsolescence. These are few examples of the waste encountered by a manual system. Testing and analysis has proven that automated forms reduce information processing time.
 - b. Automating forms and using an electronic medium to generate forms has now become a reality for the CG. Forms Plus Laser (FPL) created by Foresite based in Redwood City, CA. is the standard forms automation software to be used in the CG. Forms Plus Laser runs on the CGSW and uses the Canon LBP-8II Laser Printer currently on the UNISYS contract. Each program comes with a manual, a quick reference card, a form design over-lay grid, an automatic demo disk and a tutorial. FPL offers Context-sensitive help by pressing the "Help" key. This learning aid will assist users when questions arise. FPL is available on the CGSW contract.

4. DISCUSSION. Unisys provides support for all licenses purchased off the CGSW contract. All Forms Plus (FP) licenses purchased directly from Foresite will be upgraded to FPL as part of a CG-wide upgrade purchased by G-TIS. Upgrades of Unisys licenses and additional licenses can be purchased from the contract. When FP licenses are upgraded, a forms library of the most commonly used forms will be attached. Foresite will serve as the initial distributor of the Forms Library. Supply Center Brooklyn (SUPCEN) will distribute all subsequent libraries. Forms libraries will be distributed semiannually. Over time, this distribution may be done more or less frequently. This will be re-evaluated regularly. FPL for Coast Guard Forms also requires the Perfect Form cartridge for the Cannon printer. The Perfect Form Cartridge is also available on the Unisys contract.
5. FORMS LIBRARY. The Forms Library is a depository of all CG, CGHQ, Standard Forms (SF), Optional Forms (OF) and Other Government Agency Forms (OGA). All such forms that are new, revised or removed from the system must be sent via the Forms Library. The Library shall retain approved CG forms and will serve as the distribution point for authorized forms CG-wide. No OGA form shall be automated without prior written approval of the originating government agency. Automation will increase office productivity but will not eliminate the requirement for control and standardization. The Library will serve as the final repository for all approved forms.
6. PRIVACY ACT (PA). The Privacy Act is intended to provide safeguards against invasions of privacy through the misuse of records by Federal agencies. Accordingly, no information should be filed and/or retrieved by a personal identifier unless documented in an approved PA system of records. This includes mechanisms that can be traced back to an individual. COMDTINST M5260.2 (series), Privacy and Freedom of Information Acts Manual discusses PA law and regulations.

7. PROCEDURES.

- a. Unit commanding-officers that have a need to design forms shall establish their own procedures for internal forms design.
- b. Chiefs of offices and special staff divisions at Headquarters shall submit a request to automate forms on floppy disk with the new Perfect Form image, Forms Overlay Canon, and template to Commandant (G-TIS-7) for approval. Include the following with the request:
 - (1) draft of the directive, applicable portion of the publication or amendment prescribing the form;
 - (2) supporting statement briefly describing how the form will be used and by whom;
 - (3) signed Printing and Binding Request (DOT.F-1700.3) for the purpose of distribution and mailing labels, if applicable.
 - (4) signed CGHQ 3342 Form/Report Information Authorization record.
- c. In the last paragraph of a directive, the user must be informed of the availability and an approximate date of receipt.
- d. Originators are responsible for maintaining a separate official case file of the implementing directive and all supporting documents per COMDTINST M5215.6 (series), Directives System.

8. RESPONSIBILITIES

- a. Commandant (G-TIS-7) will:
 - (1) Maintain the forms library and ensure that it is current and up-to-date;
 - (2) Notify Supply Center Brooklyn of all changes to forms;
 - (3) Send Supply Center Brooklyn a floppy disk of all new or revised forms for distribution;
 - (4) Automate forms that have an annual usage rate of 2,000 or more.
 - (5) Provide assistance to program managers when converting paper forms to electronic medium.